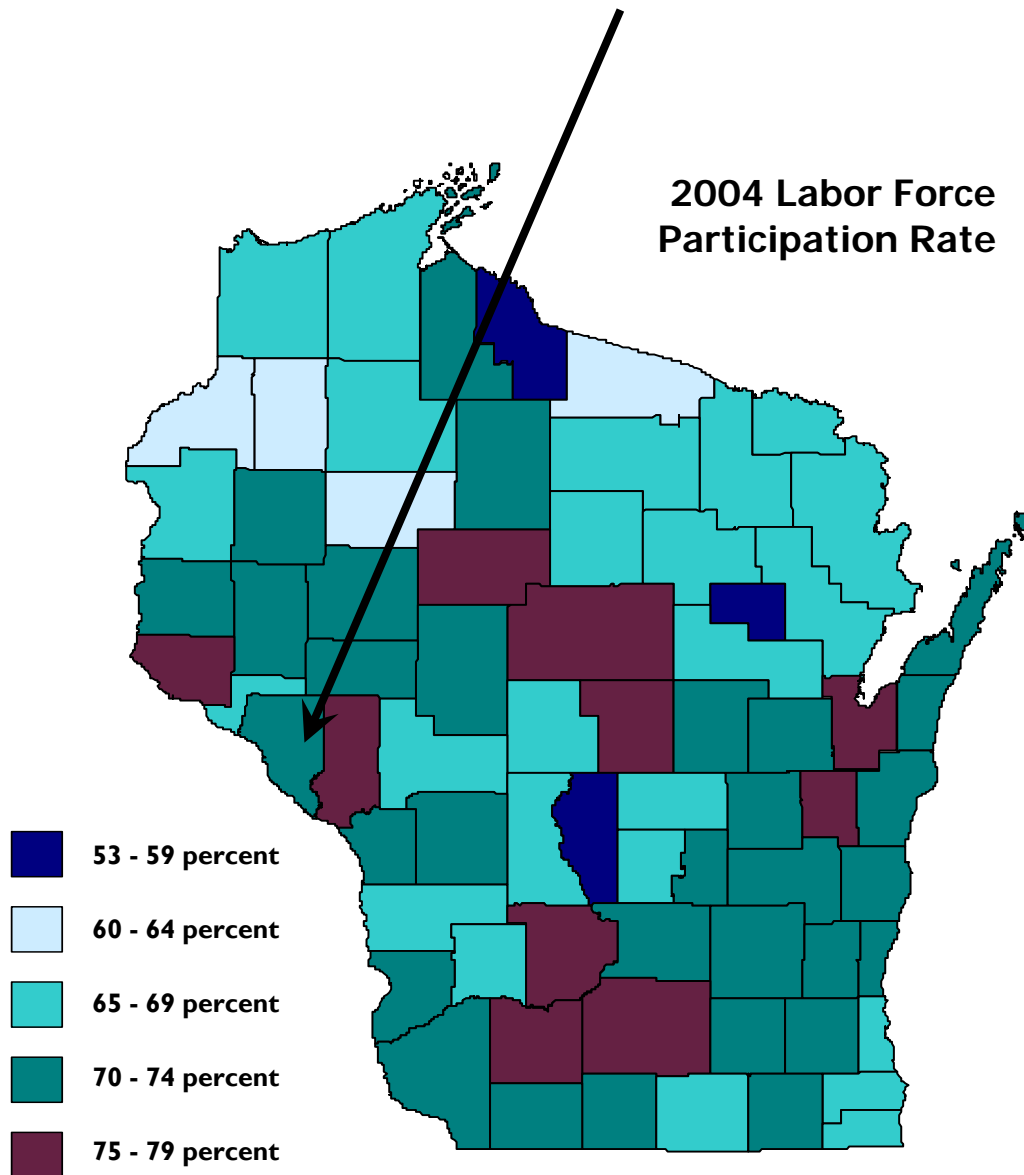


Buffalo County Workforce Profile



Source: Estimates created by DWD, OEA using data supplied by
U.S. Bureau of Labor Statistics and U.S. Bureau of Census

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State of Wisconsin
Department of Workforce Development
Office of Economic Advisors

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County Population and Labor Force

Buffalo County's population growth rate was much slower than both the state and nation between 2000 and 2005. Since 2000, the county has grown by 272 residents. Population projections for the period 2000 to 2020 indicate that the county will increase a little over one half the rate of the state and about a third the national rate. The overall growth rate for the county between 2000 through 2020 is projected to be 7.7 percent, compared to 13.9 percent for the state and 19.3 percent for the nation.

The percent of the population aged 16 years and over that is currently in the labor force is 72.4 percent. This is just above the statewide average of 70.8 percent and well above the nation's participation rate of 65.4 percent. A high participation rate indicates that a high portion of the population over age 16 is currently attached to the labor force.

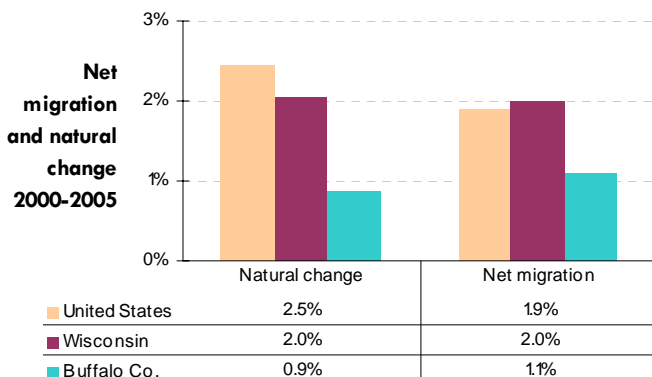
The high participation rate for the county is interesting based on the demographics of the county. The county has lower percentages of its labor force aged population than the state and nation under age 60. However, it has a higher percentage of workers aged 60 years and above than the state and nation. Normally this is the age that workers are either retired or near retirement. The high participation may be a result of the high percentage of jobs in the trucking industry which is a major source of jobs in the county and has remained stable during the last several years.

The make-up of the county's population by age group may

Five largest municipalities in Buffalo County

	April 2000 Census	Jan. 1, 2005 estimate	Numeric change	Percent change
Buffalo County	13,804	14,076	272	2.0%
Mondovi, City	2,634	2,705	71	2.7%
Buffalo, City	1,040	1,057	17	1.6%
Fountain City, City	983	1,002	19	1.9%
Alma, City	942	945	3	0.3%
Buffalo, Town	667	708	41	6.1%

Source: Wis. Dept. of Administration, Demographic Services, August 2005



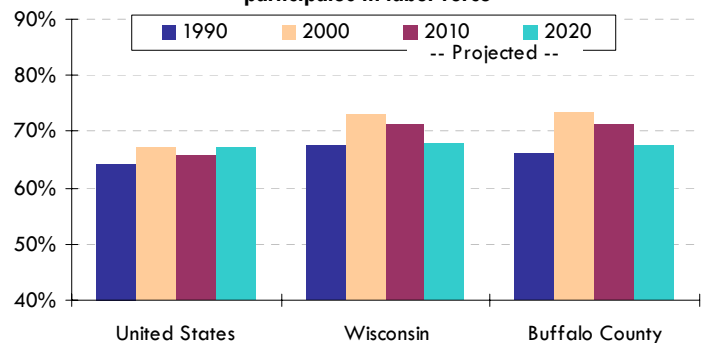
Source: WI Dept. of Admin., Demographic Services & US Census Bureau

Population and Labor Force

	United States	Wisconsin	Buffalo County
Total population in 2000	281,424,602	5,363,715	13,804
Population est. Jan. 1, 2005	295,160,302	5,580,757	14,076
Change	13,735,700	217,042	272
% change	4.9%	4.0%	2.0%
2005 Labor force population*	224,837,000	4,339,938	11,197
Share of total population	76.2%	78%	79.5%
Labor force	147,125,000	3,071,179	8,108
Labor force participation rate	65.4%	70.8%	72.4%
2005 Population 16 yrs. & over	228,621,674	4,417,313	11,326
16-24 yrs old	37,489,370	743,764	1,728
Share of population 16+ yrs	16.4%	16.8%	15.3%
25-59 yrs old	142,248,896	2,708,865	6,575
Share of population 16+ yrs	62.2%	61.3%	58.0%
60 yrs and older	48,883,408	964,684	3,023
Share of population 16+ yrs	21.4%	21.8%	26.7%
Projected population: 2020	335,804,546	6,110,878	14,872
Population 16 yrs. & over	264,085,104	4,869,573	11,986
16-24 yrs old	37,918,865	681,586	1,333
Share of population 16+ yrs	14.4%	14.0%	11.1%
25-59 yrs old	150,678,402	2,756,884	6,346
Share of population 16+ yrs	57.1%	56.6%	52.9%
60 yrs and older	75,487,837	1,431,103	4,307
Share of population 16+ yrs	28.6%	29.4%	35.9%

* civilian population 16 yrs. and older not in an institution

Percent of labor force age population that participates in labor force



Source: special tabulation by OEA using US Census, US Bureau of Labor Statistics, WI Dept. of Admin. estimates and projections

have some impact on the future of the county and economic development in the area. The percentage of the population in the groups between 16 and 59 years is well below the state and nation, while those over age 60 is above the state and national average. Workers in this age group are generally at or near retirement, possibly limiting future labor force and economic growth in the county.

Revised Labor Force

The county's labor force had its largest increase of workers between 2000 and 2001 when it increased by 359 workers. This occurred at the same time that the nation entered the latest recession after several years of decline in the county labor force. The county saw growth in 2002, but this has reversed itself over the last two years as the labor force declined in both 2003 and 2004.

The county's unemployment rate reached a low point in 1999 at 2.9 percent. During the last fifteen years, the county's unemployment rate has generally been above the statewide average.

The unemployment rate for the county increased with the onset of the recession in 2001. Although the recession also ended in 2001, the unemployment rate continued to rise through 2003 when it reached 5.1 percent. Since that time, the number of unemployed and the rate have declined.

Currently the labor force for the county is at 8,108. Although the unemployment rate has moderated during the last year, and the number of workers estimated to be unemployed has dropped below the long term average of 347.

Buffalo County Civilian Labor Force Estimates

	Labor force	Employed	Unemployed	Unemployed rate
1990	7,155	6,759	396	5.5%
1991	7,142	6,660	482	6.7%
1992	7,242	6,807	435	6.0%
1993	7,580	7,222	358	4.7%
1994	7,784	7,423	361	4.6%
1995	7,809	7,487	322	4.1%
1996	7,979	7,717	262	3.3%
1997	8,100	7,817	283	3.5%
1998	8,045	7,806	239	3.0%
1999	7,949	7,716	233	2.9%
2000	7,883	7,603	280	3.6%
2001	8,242	7,880	362	4.4%
2002	8,498	8,095	403	4.7%
2003	8,463	8,031	432	5.1%
2004	8,108	7,747	361	4.5%

Source: DWD, Bureau of Workforce Information, Local Area Unemployment Statistics, September 2005

Education Attainment

The focus of this analysis to this point has been on quantitative changes in Buffalo County's population and labor force. At this point we move to information on the quality of the county's labor force in comparison with the state and nation by age and gender.

Among the ways which experts measure the overall quality of a region's skilled workforce is through an analysis of the level of education attainment among the population. An ex-

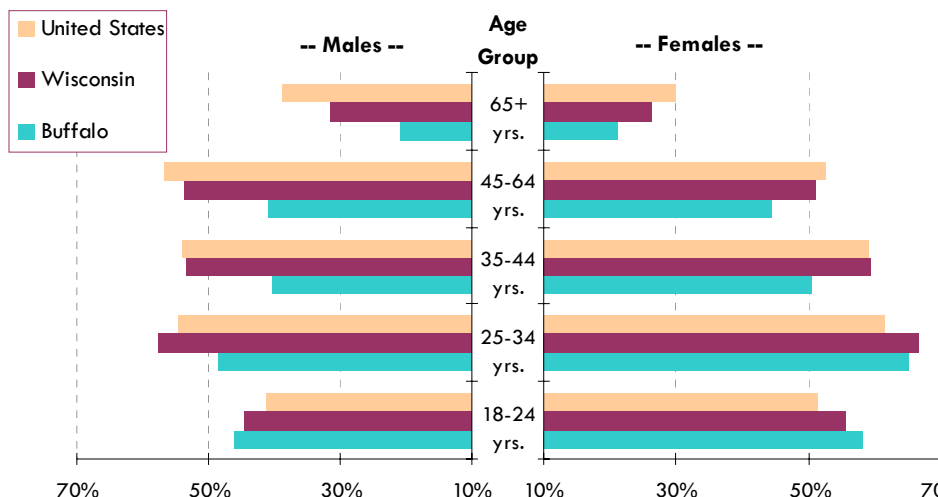
ample of this analysis is depicted in the graph below. In reviewing this data, a number of significant trends are apparent.

The county is surpassed by the state and national averages on the level of post-secondary education (measured as attendance at either a technical or community college and/or four-year college or university) at all ages over 35. Only in the 18 to 24 year age groups for both sexes does the percent with post-secondary education surpass the state and nation; and females surpass the national average in the 25 to 34 year age group.

This may be a result of employment opportunities in the county. Just under 50 percent of the jobs in the county are in the trade, transportation and utilities industries. Transportation by itself provides about 40 percent of the county's jobs. Most of these jobs do not require post-secondary education.

The percentage of females in the county with post-secondary education exceed males in every age group. This is slightly different than state and national trends where the percentage of females with post-secondary education only exceeds that of males in the youngest three age groups.

Residents with post-secondary education



Source: US Census 2000, Summary file 3, QT-P20

Employment and Wages

Average wages in Buffalo County were very close to the statewide average in 2004. Average wages in two of the county's industry sectors were well above state average wages. These were the trade, transportation, and utilities industries (145.1 percent), and professional and business services (116.4 percent). Professional and business services had the highest average wage in the county at \$46,087, followed by the trade, transportation and utilities industry at \$43,664.

Although the trade, transportation and utilities super-sector had the second highest average wage in the county, it is this sector that provides the greatest number of jobs and wages in the county. The sub-sector of transportation is the primary industry in this group. Overall, trade, transportation, and utilities provide 49.3 percent of all of the county's jobs, and nearly two thirds (63.0 percent) of all the wages paid in Buffalo County.

It is also one of the two industry sectors where the percentage of the county's wages exceeds the percentage of jobs in the county. The industry paid out four and a half times as much in wages as the next closest industry sector, education and health.

During 2004, employers in the county added 58 jobs. The majority of these new jobs occurred in the trade, transportation

Average Annual Wage by Industry Division in 2004

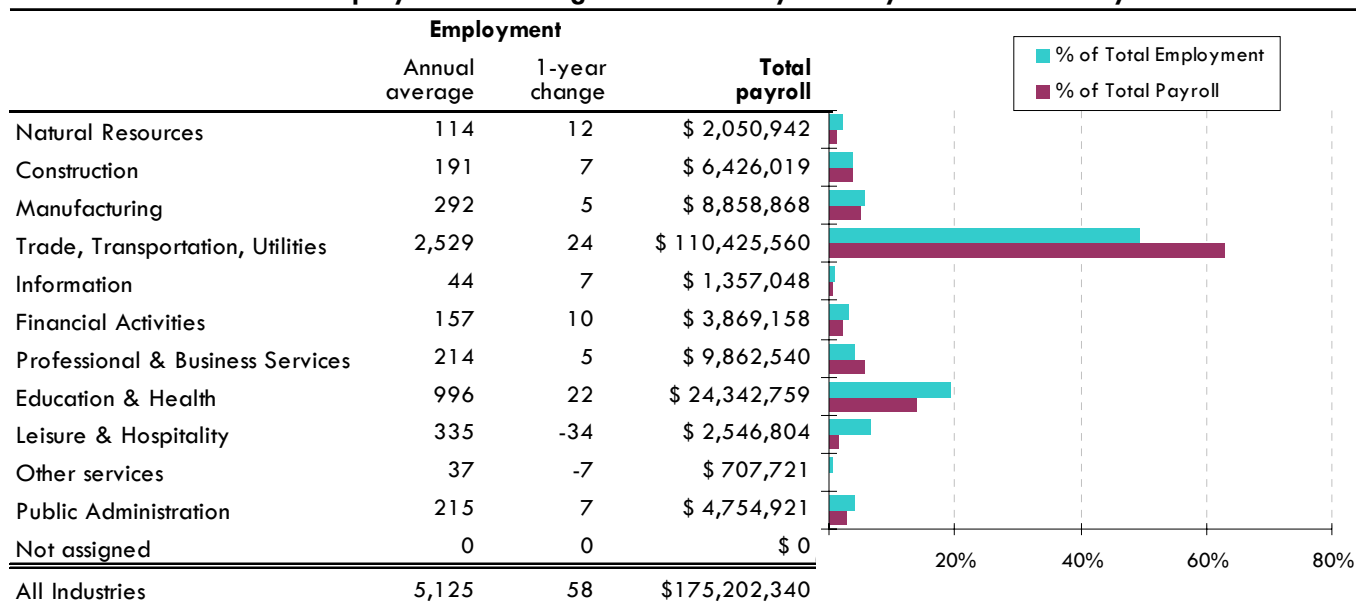
	2004	2004		
	Average Annual Wage	Average Annual Wage	Percent of	1-year
	Wisconsin	Buffalo County	Wisconsin	% change
All Industries	\$ 34,749	\$ 34,186	98.4%	8.9%
Natural resources	\$ 27,399	\$ 17,991	65.7%	20.3%
Construction	\$ 41,258	\$ 33,644	81.5%	22.2%
Manufacturing	\$ 44,145	\$ 30,339	68.7%	4.2%
Trade, Transportation, Utilities	\$ 30,088	\$ 43,664	145.1%	9.6%
Information	\$ 41,759	\$ 30,842	73.9%	23.9%
Financial activities	\$ 45,103	\$ 24,644	54.6%	6.6%
Professional & Business Services	\$ 39,580	\$ 46,087	116.4%	4.3%
Education & Health	\$ 36,408	\$ 24,441	67.1%	3.7%
Leisure & Hospitality	\$ 12,295	\$ 7,602	61.8%	6.0%
Other services	\$ 20,207	\$ 19,128	94.7%	9.7%
Public Administration	\$ 36,347	\$ 22,116	60.8%	6.7%

Source: WI DWD, Bureau of Workforce Information, Quarterly Census of Employment & Wages

and utilities industries. Other industries with increases were education and health with 22 new jobs and natural resources which added 12 jobs.

The positive ratio of jobs to wages that occurs in the trade, transportation and utilities industries is reversed in industries such as leisure and hospitality which provides 6.5 percent of the county's jobs (335), but only 1.5 percent of the county's wages. The lower ratio in this industry is often related to a higher percentage of part-time and seasonal jobs. In Buffalo County, this industry customarily relies on hunting and fishing opportunities to attract tourists to the area.

2004 employment and wage distribution by industry in Buffalo County



Source: WI DWD, Bureau of Workforce Information, Quarterly Census Employment and Wages, June 2005

Industry and Employers by Size

Top 10 Employers in Buffalo County

Establishment	Product or Service	Size (Dec. 2004)
Marten Transport, Ltd.	Gen. freight trucking, long-dist, truckload	1000+ employees
Mondovi Public School	Elementary & secondary schools	100-249 employees
Cochrane-Fountain City Public School	Elementary & secondary schools	100-249 employees
County of Buffalo	Executive & legislative offices, combined	100-249 employees
US Department of Defense	Engineering services	100-249 employees
Dairyland Power Coop	Fossil fuel electric power generation	100-249 employees
American Lutheran Homes Inc	Nursing care facilities	100-249 employees
Midwest Dental Care Mondovi Inc	Offices of dentists	100-249 employees
La Crosse Milling Co	Other animal food mfg.	50-99 employees
Gemini Employee Leasing Inc	Services for the elderly & disabled	50-99 employees

Source: DWD, Bureau of Workforce Information, ES-202, July 2005

Prominent industries in Buffalo County

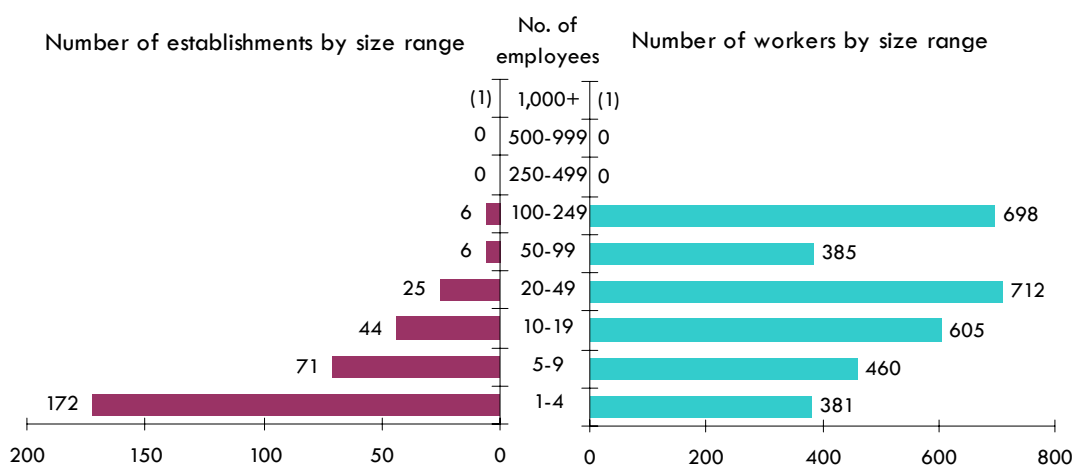
NAICS title	March 2005		Numeric change in employees	
	Establishments	Employees	2004-2005	2000-2005
Truck transportation	*	*	not avail.	not avail.
Educational services	4	445	6	-29
Food services and drinking places	34	240	-30	-91
Ambulatory health care services	17	223	29	38
Nursing and residential care facilities	5	217	7	-25
Food manufacturing	8	215	30	33
Professional and technical services	20	147	3	-17
Social assistance	4	144	15	27
Utilities	*	*	not avail.	not avail.
Executive, legislative, & gen government	23	138	-11	-9

* data suppressed to maintain employer confidentiality

Column headings revised 02/06

Source: DWD, Bureau of Workforce Information, ES-202, September 2005

Buffalo County establishments and workers by employment size range in 2004



(1) Data not available due to suppression factors

Source: DWD, Bureau of Workforce Information, Table 221, July 2005

On page three it was noted that trade, transportation and utilities industries had the largest share of workers. Truck transportation is a subset of these industries and has the largest share of the jobs in the group, and Buffalo County has the highest percent of jobs in this industry (37.6 percent) in the State of Wisconsin. It should be no surprise that this industry should be at the top of the list for largest employers and largest industry in the county.

Both lists include public and private employers. This shows the importance of government as an employer in the county. Included in the list of largest employers is the Mondovi Public Schools and Buffalo County government as well as the U.S. Department of Defense. This is carried through to the top ten industry list which includes both educational services and executive, legislative and general government. Educational services includes both private and public schools.

The graph on the bottom of this page indicates that the majority of the county's employers are small with fewer than 10 employees (75.2 percent), and they provide 26 percent of the county's jobs. Conversely, employers with 20 or more workers make up only 5.5 percent of the employer base, however, these employers provide 55.4 percent of the jobs in the county.

Per Capita Personal Income

One other aspect of looking at the local economy is the per capita personal income (PCPI) in the county. Because the income is derived from all sources, it tells more than just what wages or types of jobs are available. The latest PCPI available is for the year 2003 when PCPI in Buffalo County was \$29,083. The county's PCPI ranks 20th among the state's 72 counties.

The county ranked 28th in its five-year growth rate. PCPI in the county was \$1,602 below the state, and \$2,389 below the nation.

PCPI is defined as total personal income divided by the total population. The majority of total personal income, though not exclusive to this list, is made up of wage and salary earnings, dividends from holdings, accrued interest, rental property income, retirement benefits, social security and other government transfer payments.

The largest portion of PCPI is from net earnings. The lower PCPI in the county is a reflection of the lower average wages compared to the state, similar to many rural counties where wages are generally lower than in urban areas.

Net earnings make up 69.6 percent of total income in Buffalo County. This is just slightly less than in the state where net earnings are 69.9 percent of total income. Total income in the county also includes income from dividends, interest, and rental property (15.4 percent), and transfer payments (15 percent).

The share of income from transfer payments, which is chiefly Social Security and Medicare payments, was above the state average of 14 percent. This reflects the county's population demographics to some extent as it is older than the state and nation. Based on

current population estimates the county has a five percent greater portion of the population aged 60 and above. This may reduce the over all PCPI average a bit as it is at 94.4 percent of the state's average, while wages were at 98.4 percent of the statewide average.

Wisconsin Counties 2003 Per Capita Personal Income and Rank in State

Area	2003	Rank	5-yr growth	Rank	Area	2003	Rank	5-yr growth	Rank
United States	\$ 31,472		17.1%		Manitowoc	\$ 27,807	27	13.6%	59
Wisconsin	\$ 30,685		17.2%		Marathon	\$ 29,992	16	22.0%	5
Adams	\$ 22,804	59	16.1%	37	Marinette	\$ 25,448	39	21.3%	9
Ashland	\$ 23,204	55	16.6%	32	Marquette	\$ 22,590	64	26.5%	1
Barron	\$ 24,922	41	15.2%	44	Menominee	\$ 18,449	72	19.8%	16
Bayfield	\$ 22,660	62	13.4%	60	Milwaukee	\$ 31,419	7	19.5%	18
Brown	\$ 32,076	5	17.8%	25	Monroe	\$ 23,467	54	16.8%	31
Buffalo	\$ 29,083	20	17.2%	28	Oconto	\$ 24,842	42	12.3%	66
Burnett	\$ 22,796	60	17.1%	29	Oneida	\$ 28,646	22	18.7%	21
Calumet	\$ 31,880	6	21.4%	8	Outagamie	\$ 30,952	11	20.5%	14
Chippewa	\$ 25,999	36	12.3%	67	Ozaukee	\$ 47,527	1	14.7%	48
Clark	\$ 22,227	66	13.9%	55	Pepin	\$ 24,407	44	13.0%	64
Columbia	\$ 30,846	12	18.2%	24	Pierce	\$ 27,963	26	18.6%	23
Crawford	\$ 22,628	63	20.9%	13	Polk	\$ 24,201	46	13.9%	54
Dane	\$ 36,455	3	21.0%	12	Portage	\$ 27,464	30	21.1%	11
Dodge	\$ 26,048	35	13.3%	61	Price	\$ 24,361	45	12.2%	68
Door	\$ 30,657	13	15.9%	40	Racine	\$ 31,271	8	15.0%	45
Douglas	\$ 23,568	53	15.3%	43	Richland	\$ 23,829	51	21.9%	6
Dunn	\$ 22,885	58	14.9%	47	Rock	\$ 28,256	25	14.1%	50
Eau Claire	\$ 27,469	29	17.5%	27	Rusk	\$ 20,461	71	14.0%	52
Florence	\$ 24,146	47	25.3%	3	Sauk	\$ 28,780	21	19.5%	19
Fond du Lac	\$ 29,951	17	16.1%	38	Sawyer	\$ 23,921	50	22.3%	4
Forest	\$ 21,975	68	25.4%	2	Shawano	\$ 23,941	49	13.9%	56
Grant	\$ 24,116	48	15.6%	42	Sheboygan	\$ 31,251	9	19.8%	17
Green	\$ 28,542	23	14.0%	51	St. Croix	\$ 31,091	10	13.6%	57
Green Lake	\$ 26,962	32	8.1%	72	Taylor	\$ 23,020	56	16.6%	34
Iowa	\$ 27,308	31	19.2%	20	Trempealeau	\$ 25,242	40	18.7%	22
Iron	\$ 22,912	57	21.1%	10	Vernon	\$ 20,950	70	15.7%	41
Jackson	\$ 26,084	34	21.9%	7	Vilas	\$ 25,664	37	13.0%	63
Jefferson	\$ 29,330	18	16.5%	35	Walworth	\$ 27,626	28	13.6%	58
Juneau	\$ 22,382	65	12.7%	65	Washburn	\$ 22,794	61	16.0%	39
Kenosha	\$ 29,117	19	16.5%	36	Washington	\$ 35,196	4	14.9%	46
Kewaunee	\$ 25,536	38	8.8%	71	Waukesha	\$ 41,551	2	12.2%	69
La Crosse	\$ 28,284	24	16.8%	30	Waupaca	\$ 26,863	33	14.0%	53
Lafayette	\$ 21,983	67	10.1%	70	Waushara	\$ 21,762	69	13.2%	62
Langlade	\$ 23,739	52	20.4%	15	Winnebago	\$ 30,359	15	16.6%	33
Lincoln	\$ 24,725	43	14.6%	49	Wood	\$ 30,401	14	17.7%	26

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, Regional Economic Information System, May 2005